

Repairline User Guide

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1. Repairline / How to Start/Set up

Keep track of your Service Cases

The extensive online tool for flexible handling of service and repair brings your workflow into line and repaired equipment back to the client as quickly as possible – for repair service provider, merchants and manufacturers.

How you **CAN** start:

All steps will be explained in detail in the sections 2. - 13.6.

First of all you have to log on at system.repairline.de by entering your username and your password that you received from us. Register online: repairline.de/index.php/en/testing-en

Please enter your username and password.

Username *

Password *

Remember me

LogOn

Now you can change the password by clicking on “**My Account**” – “**Change Password**” and right after that enter your company’s account-information’s by clicking on “**Account-Informations**”.

Overview New Service Case New Ticket Loan units Se... ▶

MY ACCOUNT CUSTOMER ADMINISTRATION DOCUMENTS STOCK PROCUREMENT

My Account: 'initPRO, Developer [sunrise@initpro.de]'

Profile

Common

Account-Informations

Change Password

(Described in detail in 8.1 and 8.2)

Now you should set up your Business Process configuration. For this you have to click on “**Administration – Business – Settings**”. Now create your Business Units by clicking on the “Add” icon on the right. After that create your Manufacturer’s by clicking on the other “Add” icon and set the Manufacturer-BusinessUnits relations. The Manufacturer-Businessunit list will be created automatically. You also assign the Workflows and Service-Codes to the Manufacturer-BusinessUnits.

The screenshot shows the "Settings: Business" section of the initPRO software. It consists of three stacked tables:

- Business Unit:** Shows three entries. Each row has an "Actions" column with edit and delete icons, a "Company" column, and a "Business Unit" column.
- Manufacturer:** Shows four entries. Each row has an "Actions" column with edit and delete icons, a "Company" column, and a "Manufacturer" column.
- Manufacturer-Businessunits:** Shows six entries. Each row has an "Actions" column with edit and delete icons, a "Statuscode" column (containing "Valid" or "Invalid"), a "Manufacturer" column, and a "Business Unit" column. The "Statuscode" column is highlighted with a red border.

(Described in detail in 10.13)

Up next is the Service-Code. To create Service-Codes click on “**Administration – Business – Service-Code**”. Service-Codes serve as structured documentation and documentation of failure -symptoms -states and made repairs. You can use either one of the 4 System-Templates and change them the way you want or you can even create your own Service-Code! This allows you a manufacturer-independent service execution.

MY ACCOUNT CUSTOMER ADMIN **ADMINISTRATION** DOCUMENTS STOCK PROCUREMENT

Index: Service-Code

System-Templates [4]

Actions	Code-Spezification	Code-Spezification-Description
	Handy-Code*	Codierung von Handy-Fehlersymptomen und /-reparaturen*
	IRIS Code	IRIS Code
	Notebook Code	Notebook Code
	Simple Code	Symptom and action

Settings

Actions	Company	Code-Spezification	Code-Spezification-Description
	Customer Administration	IRIS Code	IRIS Code
	Customer Administration	Test	Test
	Customer Administration	Test	Test

(Described in detail in 10.11)

Now click on “**Administration – Business – Workflow**” to confirm your Workflows. The Workflow is the actual repair process that is performed the same or similar for repairs. You can use either one of the System-Templates and confirm them the way you want or you can even create your own Workflow!

MY ACCOUNT CUSTOMER ADMIN **ADMINISTRATION** DOCUMENTS STOCK PROCUREMENT

Index: Workflow

System-Templates [2]

Actions	Textkey
	Werkstatt Reparatur*
	Initial

Settings

Actions	Company	Textkey	Statuscode	Copy from	Ordering
	Customer Administration	Standard*	Valid	No	
	Customer Administration	Initial	Valid	Initial	

(Described in detail in 10.12)

Now you should select your Service Types. The service type determines which repair services are offered to the customers. Click on “**Administration – Business – Service Type**”. And

again there are a lot of System-Templates that you can use. If the needed Service Type is not listed in the System-Templates you can create your own.

The screenshot shows the 'System-Templates' list and a new template creation dialog.

System-Templates [17]

Actions	Servicetype-Key	Textkey
	BI	Bring in
	CBR	Central board repair
	DOA	DOA
	ESC	Escalation
	EX	Exchange
	HS	Home service
	P	Pickup
	PUR	Pickup+Return
	PEX	Preexchange
	PP	Premium pickup
		Premium service
	RE	Refund
	RET	Return
	RMA	RMA
	S	Shuttle
	SWAP	Swap
	TD	Transportation damage

Settings

New Service Type

Actions	Company	Servicetype-Key	Textkey
		BI	Bring in

(Described in detail in 10.15)

Now you have the minimal together to create a Servicecase.

2. Info-Panel

The Info panel shows you under which user / company you are logged in. You also be quickly accessed via the Info panel to all the information about your service cases, tickets and client meetings. By clicking on service cases, tickets or client appointments appear a detailed overview. In the information panel is at the top right a "Logout" icon, click on this icon to log out.

3. Overview

Under the menu item "**Overview**" you can get a quick and easy overview of your Servicecases, tickets and customer meetings. Set the filters as desired and click the "Apply" icon (the icon on the right). Now the desired Servicecases / Tickets / Customer Meetings will be shown and can be edited by clicking on the "Edit" icon. If there is a Servicecase that is similar (for example same Manufacturer – Businessunit and Costumer) to a new Servicecase you can create a new Servicecase "Clone" that will save you time. To reset the filter's settings, click the "Reset" icon (the icon on the left).

	All	Booked	Maximum stay	Workflow stopped	Case- no	Predecessor- no	Warranty	Customer
	Unterwegs zum Servicecenter [Shop]*	29/10/2012	OK	-	00001	-	Warranty	
	Unterwegs zum Servicecenter [Shop]*	19/09/2012	OK	-	00002	-	Repair with cos..	
1	Einträge pro Seite*	5	10	25	50			

4. New Servicecase

To add a new service you have to click on "New Service Case".

By using the Servicecase-Input-Assistant, you can enter all the relevant details of a repair order in only few steps. The Input-Assistant can be configured according to your wishes. This allows for example a rapid mass capture of Servicecases.

Click on the "Settings" icon (on the right top) to set the current settings of the Input-Assistant. You can select the start point of the Input-Assistant and confirm the Bulk-Announcement by setting a check mark to the chosen section. This section will be reset for each new Servicecase.

Settings ×

Settings for input assistance

Start point Manufacturer - Businessunit
 Serial Number - Product

Bulk-Announcement Reset Serial
 Reset Product
 Reset Customer

Save **Abbrechen**

You have the option to write a comment to each Servicecase and select settings (such as Data Backup, Recustomize, Customer Survey, Reference) and see the Previous Repairs.

New Case: > Bulk import: [Excel]

> **Manufacturer - Businessunit**

Manufacturer

Business Unit

Next

> *Serial Number - Product*

> *DOA check*

> *Customer*

> **Comment**

> **Settings**

Data Backup
Recustomize
Customer Survey

Reference

> **Previous Repairs**

No Entry

The entry of the Servicecase:

At first select the Manufacturer and the Business Unit of the device and click on “Next”. Enter (if available) the serial number (and the second serial number) of the product that has to be edit. If the serial number is not available place a checkmark next to “Serial Number is missing” (either the serial number must be given or serial number is missing must be set). Now enter the name of the product (mandatory item). In order to receive a product from your product list, click on the “Loupe” and select the desired product by clicking on it. If the wanted product is not listed in your product list, you have the option of creating the product while you are recording the Servicecase. For that you have to click on the “Add” icon. If you have selected the Serial Number and the Product click on “Next”.

Serial Number - Product

Serial Number *

Second Serial Number

Serial Number is missing

Product *

Next

Specify the Service Type for this repair and click on “Next”.

Enter the customer's name in the search bar. If the customer is already known the name and address of the customer will appear. Click on the displayed customer. If the customer is not registered as a customer yet, click on the “Add” icon to create the new customer. After the customer has been selected the customer information's will be shown. Now you can select Contact, Invoice Address and Delivery Address. If the information's of costumers are not up-to-date you can update them by clicking on the “Edit” icon. When all of the information's are correct then click on “Next”.

^ Customer

Search Mustermann Max, Musterfirma, Mu

Customer data

Customernumber 00002

Reference

Title

Firstname Max

Lastname Mustermann

Companyname Musterfirma

Email muster-email@initpro.de

Phone mobile 0123456789

Languagesetting Deutsch

Customer contact Sms

Contact Mustermann, Max, Musterfirm

Invoice Address Mustermann, Max, Musterfirm

Delivery Address Mustermann, Max, Musterfirm

Next

Select the Warranty Type (for example warranty or repair with costs) and enter the date of purchase and the expiration date. If the correctness of the accounts and warranty could be checked, please put a check mark for confirmation. You also have the option of adding facilities (for example till receipt). Click on “Next”.

^ Warranty

Purchase date

Expiration date

Warranty type *

Accounting type *

Max. Repair CHF *

 Purchase and warranty checked

Add Attachments Keine ausgewählt

Next

The DOA-check will set the Servicecase as DOA-check passed or rejected. If the statement of the DOA-check that is true set a checkmark and the next statement of the DOA-check will appear. If a statement is not true, click on “Next” and the Servicecase will be set as DAO-check rejected. If all the statements of the DOA-check are true and all checkmarks has been set click on “Next” and the Servicecase will be set as DOA-check passed.

^ DOA check

DOA meets deadline according to the date of purchase. Perform testing to DOA?

Packaging and complete?

Goes back longer than 5 days of sale/delivery at delivery@home?

Impeccable condition of the device (no scratches, no mechanical damage)?

Impeccable condition in the original packaging (no damage, no additional be
schriftungen or sticker)?

Is the IMEI number on the appliance and the packaging the same?

Next

^ DOA check

DOA meets deadline according to the date of purchase. Perform testing to DOA?

Packaging and complete?

Goes back longer than 5 days of sale/delivery at delivery@home?

Impeccable condition of the device (no scratches, no mechanical damage)?

Impeccable condition in the original packaging (no damage, no additional be
schriftungen or sticker)?

Is the IMEI number on the appliance and the packaging the same?

DOA check passed

Now define the failure symptoms. By entering the symptom in the search line and the symptom are known the symptom and action will be set automatically. To add an additional symptom you have to click on the “Plus” icon next to Add. Symptoms. In order to achieve a more detailed error description, add a detailed symptom description / Comment in your own words to describe the symptoms.

^ Failure symptom

Symptomauswahl 🔎 ↻

▼ Symptom 🔎	[01] Defect	▼
▼ Action 🔎	[01] Repair	▼

Add. Symptom +

Detailed symptom description / Comment

Next

Select Workflow and entry point and click on “Next”.

^ Repairline workflow

Workflow	Standard	▼
Workflow-Step-Id	Order created	▼

Next

On the adoption of the device supplied accessories can be optionally registered. Set a checkmark to each accessories that is delivered. If every accessories are sent along put a checkmark next to Name and all accessories will be selected.

^ Accessories

<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	Battery
<input checked="" type="checkbox"/>	casing
<input checked="" type="checkbox"/>	Charger
<input checked="" type="checkbox"/>	data cable
<input checked="" type="checkbox"/>	Headset
<input checked="" type="checkbox"/>	memory card
<input checked="" type="checkbox"/>	original packaged and complete
<input checked="" type="checkbox"/>	SIM Reader
<input checked="" type="checkbox"/>	warranty paper

Next

To forward a service case to colleague, select from the drop-down list "user" the desired colleagues.

To create a customer appointment, enter your appointment details.

Appointment

Appointment *

Reminder (min.) *

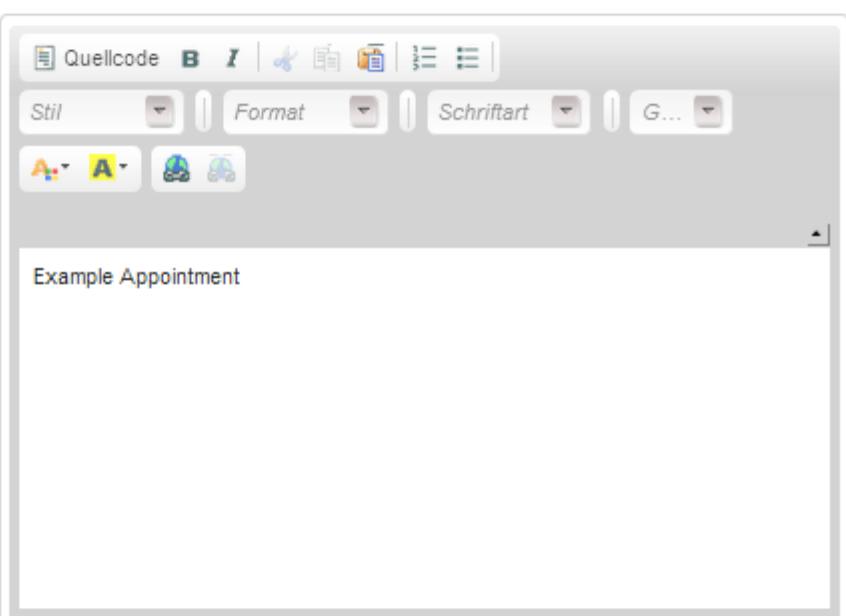
Subject *

Status *

User *

Location: *

Content



body

Public

Save

Click on "Create" to complete the servicing acquisition.

5. New Ticket

The ticket system manages your service requests. Each process is given a unique number so that the inquiries will be forwarded to the responsible contact person and can be processed as quickly as possible. To create a Ticket enter the subject, the status no. and select the priority. Enter your text in the text box and enter the names of your colleagues who will receive the ticket in the search line. It is possible to add the ticket attachments there for select a file and click on the “Add” icon. The Ticket can also be assigned to a Servicecase. For that you have to

click on the “Add” icon on the top right and select the Servicecase. To complete, click on “Create”.

The screenshot shows the 'Ticket hinzufügen' (Add Ticket) screen in the initPRO application. At the top, there's a breadcrumb navigation: Overview > Ticket hinzufügen. Below it, there are several input fields: 'Subject' (with a dropdown arrow), 'Status-ID' (set to 'New'), and 'Priority' (set to 'Low'). These three fields are all enclosed in a red rectangular box. In the top right corner of the form area, there's a button labeled 'Servicecase' with a small '+' icon, which is also highlighted with a red box. Below these, there's a 'Content' section containing a rich text editor toolbar and a large empty text area. Underneath the content area, there's a 'Public' checkbox followed by a checked checkmark. Further down, there's a 'Routing' section with a 'Search' field and a 'Recipients' list box. At the bottom left, there's an 'Add Attachments' section with a 'Attachments' label, a 'Datei auswählen' button, a 'Keine ausgewählt' message, a 'Clear' button, and an 'Add' button. All of these buttons in this section are also highlighted with a red box. Finally, at the bottom right of the form area, there's a large black 'Create' button.

6. Loan Units

Here you see all your loan units. To add a loan unit click on the “Plus” icon. Enter the name and the Serial Number of the product and select the owner of the product. Click on the “Create” icon to conclude or click on the “Create + New” icon to save the loan unit and add another loan unit. The Index gives you an overview of all loan units and shows you if the product is lent or not. By clicking on the “Actions” icons you can edit, delete or look at the information’s of the product. All lent products are listed under lended loan units if a lent product returns click on the “Return” icon to delete the product from the lended loan units list. To find a product quickly enter the serial number in the search line on top.

The screenshot shows the initPRO software interface. At the top left is the 'Index: Loan units' header, with a red box highlighting the 'Search by serial number' button. Below it is a search bar with a magnifying glass icon. To the right is an 'Index' button and a red '+' button. A table follows with columns: Actions, Product, Serial Number, Owner, and Lended. One row is visible: Actions (with icons), Product (1 -), Serial Number (1234567890), Owner (John Doe), and Lended (yes). Below this is another section header 'Lended loan units' with a red box around it. A second table has columns: Actions, Product, Serial Number, Owner, Date from, Address, and Servicecase. One row is visible: Actions (with icons), Product (1 -), Serial Number (1234567890), Owner (John Doe), Date from (18/07/2012), Address (Sommerstrasse 123, 8000 Zürich), and Servicecase (-).

7. Search

Under "**Search**" you can use either the filter or the search line to search all of your Servicecases quickly and easily.

Search with search line: Here you can search for a specific term.

For example you want to see all Servicecases of one customer therefor enter the name of the customer into the search line and every Servicecase with of that customer will appear.

Search with the Filter: Set a checkmark to each component that should be included in the search.

For example you want to see all Servicecases of one customer from 2012 to 2013. Therefor set a checkmark next to Period and select the date 01/01/2012 to 01/01/2013 and set a checkmark next to name and enter the name of the customer. And all Servicecases will appear under Search Result.

When a particular filter setting is frequently used you have the possibility to save this filter setting by setting the filter as you like and clicking on the "Save" icon. Now this filter setting are shown again. Enter a name for that filter select if the filter is available company-wide and click on "Create".

You can export your search result to an excel file. Click on the "Excel" icon and a filter will be shown. Put a checkmark to each component that should be shown as information in the excel file. Set the filter as you like and click on "Submit". To save the filter setting, enter a name for that filter, set the filter settings and click on the "Save" icon. To load a filter click on the dropdown list next to load filter. To delete a filter load the filter and then click on the "Delete" icon.

The screenshot shows the initPRO search interface. At the top, there is a search bar labeled "Search for" and a "Filter" section. The filter section is expanded and titled "User". It contains various dropdown menus and input fields for filtering search results. Below the filter is a table titled "Search Result [57]" showing three rows of data.

	All	Booked	Maximum stay	Workflow stopped	Case-no	Predecessor-no	Warranty	Customer	Serial Number	Product	Manufacturer	Business Unit	Service Type	Agent
	Repair*	05/05/2011	OK	Stopped										
	Repair*	29/03/2011	OK	-										
	RepairFinished*	04/04/2011	OK	-										

8. My Account

8.1 Account-Informations

Under "**My Account - User Information**" you can manage your own contact details and specify in which language you want to use Repair Line. It also appears your assigned role.

Account-Informations

User

Title	<input type="text"/>
Firstname	<input type="text"/>
Lastname	<input type="text"/>
Department	<input type="text"/>
Phone	<input type="text"/>
Phone mobile	<input type="text"/> 012345
Fax	<input type="text"/> 012345
Email	<input type="text"/>
Street	<input type="text"/>
Additional	<input type="text"/>
Zip-Code	<input type="text"/> 120012
City	<input type="text"/> City
State	<input type="text"/> State
Sign	<input type="text"/>
Decline Mail-Notification	<input type="checkbox"/>

Current settings

Languagesetting	<input type="text"/> English	<input type="button" value="▼"/>
Login valid until 31/12/2049 01:00		

Assigned Roles

- Administration [Administrator]
- Host [Host]
- Technician [Technician]

Save

8.2 Change Password

To change your password, click on "**My Account - Change Password**". Enter your current password and your new password. The password must be at least 6 characters. Confirm your new password by entering it again. For each password change a Captcha security feature is performed. Finally, click on "Change Password".

If you ever lose your password you have to click on the "Request Password" icon at the main page. Then they will need to enter your Shop-Email address and enter for the security check the given Captcha-String.

› LogOn: Request password

Shop-Email

› Security Check

Captcha

Captcha-String *

Requesting

8.3 Personal Requisition Notes

Here appear all of your common and servicecaserelated requisitions that you have created. By clicking the "Add" sign you can create new common requisitions.

› Index: 'Personal Requisition Notes'

^ Servicecaserelated [0]

No entries found

^ Common [1] +

Actions	User	Parts	Quantity	Servicecase	created	Requested Deliverydate	Booked	Reserved	Available	Ordered	Quantity open
	initPRO, Developer [sunrise@initpro.de]	0123456 - Example	12	no	10/12/2012 01:25	01/01/2013	0	0	0	0	12

8.4 Shoppingcart

Here you can create new requisition by using a shopping cart. Enter in the search field the part name (or part number, UPC code) and select the quantity and click on the "Select" icon. Now an information box will appears on the right top. To proceed, click on "Shoppingcart" select the requested delivery date and to complete click on "Create Requisition Notes".

› Shoppingcart: Parts Shoppingcart

Search for Example Partnumber, Partname, EAN-Code

› Result

Select	Partnumber	Partname	EAN-Code	Partdescription	Quantity
	0123456	Example			1

› [Shoppingcart > Requisition Notes](#)

› Shoppingcart

Actions	Parts	Available	Requested Deliverydate	Quantity
	0123456 - Example	0	01/01/2013	1

[Create Requisition Notes](#)

8.5 Accounting details

Under "Accounting details" you set the address to which the billing details will be sent. Please choose the invoice type (printed or email) and the payment method (for example Direct Debit or Paypal). If you choose the Direct Debit pay method you have to enter your account data's.

8.6 Monthly costs

Have a look at our well-structured price list:

Monthly costs consist of the number of registered users and the summed up monthly service cases. The following scale creates absolute transparency of costs:

Base Rate

User	1 - 10	11 - 50	51 - 100	101 - 500	501 -
Service Cases incl.	10	40	80	165	500
Price* per month	10 €	30 €	60 €	120 €	350 €

Costs per Registered Service Case

Service Cases per month	1**	51**	201**	501**	1001**	10001**	50001**
- 50	- 200	- 500	- 1000	- 10000	- 50000	-	-
Price* per Service Case	0,70 €	0,65 €	0,60 €	0,55 €	0,50 €	0,40 €	0,30 €

* all prices are quoted before value added tax.

** as from the 1st service case; as from the 51st service case; as from the 201st service etc.

"My Account - Monthly costs" here you can see the costs overview of your company. Use the filters to choose over which period you want to see the cost overview.

▶ Index: Cost overview

Month / Year	Monthly basicrate	User count	Included cases	Case count	Charged cases	Avg Costs per case	Monthly costs	Last update	Payed	Actions
12 / 2012										

^ Details

Case count	Average costs per case €	Sum €
Included cases		

8.7 Costcalculator

By using the Costcalculator you can calculate the monthly cost of your company. By entering the number of users and the number of Servicecases the Cost Calculator creates you the monthly costs that would be incurred. To calculate the monthly costs you have to enter the user count and the case count.

▶ Started: Costcalculator

User count	1 *
Case count	50 *

Calculate

▶ Monthly costs

Sum			
Included cases 10	Monthly basicrate 10.00 €		
Charged cases 40	Avg Costs per case 0.70 €		
	Monthly costs 38.00 €		

Details

Case count	Average costs per case €	Sum €
1-40	0.70	28.00
41-50	Included cases	0.00

8.7 Terminate Contract

To terminate your contract, click on "**My Account - Terminate Contract**". Now select the termination month and put a check mark to "Terminate Contract" (In the text field "Comment" you can make comments to your termination / for example the reason for the termination). To complete the termination, click on "Submit".

› Terminate Contract: 'Sunrise Communications AG'

› Your Contract can be terminated here

Cancel month	12 / 2012	▼
Comment		
<input type="checkbox"/> Terminate Contract *		
		Submit

9. Customer Admin

Customer may be created when recording a new Servicecase. Already registered customers can be searched under "**Customer Admin**". The search is performed by typing the first or last name (search also accepts Customernumber, Email, Companyname, Additional, Street, Zip-Code, City, Reference) or by using the alphabetical index. The search is done by clicking on the letter that corresponds to the first letter of the last name / company name. By clicking on the @letter all registered customers will be listed.

The "Actions" column shows 3 icons (edit, detail, delete). By clicking on the "Edit" icon the data's of the costumer can be changed. Under "Detail" the costumer information's and the last ten Servicecases will appear. By clicking on the "Delete" icon the costumer will be delete.

MY ACCOUNT	CUSTOMER ADMIN	ADMINISTRATION	DOCUMENTS	STOCK	PROCUREMENT																										
<p>› Index: '@'</p> <table border="1"> <tr> <td>Search for</td> <td>Reference, Lastname, Fristname, Customernumber, Email, Companyname, Additional, Street, Zip-Code, City</td> </tr> <tr> <td> @ A B C D E F G H I J K L M N O P Q R S T U V W X Y Z </td> </tr> <tr> <td colspan="2"> <p>› Customer</p> <table border="1"> <thead> <tr> <th>Actions</th> <th>Customernumber</th> <th>Lastname</th> <th>Fristname</th> <th>Title</th> <th>Companyname</th> <th>Address</th> </tr> </thead> <tbody> <tr> <td></td> <td>00001</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td>00002</td> <td>Mustermann</td> <td>Max</td> <td></td> <td>Musterfirma</td> <td>Musterstraße 1 1234 Musterstadt</td> </tr> </tbody> </table> </td> </tr> </table>						Search for	Reference, Lastname, Fristname, Customernumber, Email, Companyname, Additional, Street, Zip-Code, City	@ A B C D E F G H I J K L M N O P Q R S T U V W X Y Z	<p>› Customer</p> <table border="1"> <thead> <tr> <th>Actions</th> <th>Customernumber</th> <th>Lastname</th> <th>Fristname</th> <th>Title</th> <th>Companyname</th> <th>Address</th> </tr> </thead> <tbody> <tr> <td></td> <td>00001</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td>00002</td> <td>Mustermann</td> <td>Max</td> <td></td> <td>Musterfirma</td> <td>Musterstraße 1 1234 Musterstadt</td> </tr> </tbody> </table>		Actions	Customernumber	Lastname	Fristname	Title	Companyname	Address		00001							00002	Mustermann	Max		Musterfirma	Musterstraße 1 1234 Musterstadt
Search for	Reference, Lastname, Fristname, Customernumber, Email, Companyname, Additional, Street, Zip-Code, City																														
@ A B C D E F G H I J K L M N O P Q R S T U V W X Y Z																															
<p>› Customer</p> <table border="1"> <thead> <tr> <th>Actions</th> <th>Customernumber</th> <th>Lastname</th> <th>Fristname</th> <th>Title</th> <th>Companyname</th> <th>Address</th> </tr> </thead> <tbody> <tr> <td></td> <td>00001</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td>00002</td> <td>Mustermann</td> <td>Max</td> <td></td> <td>Musterfirma</td> <td>Musterstraße 1 1234 Musterstadt</td> </tr> </tbody> </table>		Actions	Customernumber	Lastname	Fristname	Title	Companyname	Address		00001							00002	Mustermann	Max		Musterfirma	Musterstraße 1 1234 Musterstadt									
Actions	Customernumber	Lastname	Fristname	Title	Companyname	Address																									
	00001																														
	00002	Mustermann	Max		Musterfirma	Musterstraße 1 1234 Musterstadt																									

To create a new costumer you have to click on the "Add" icon. After clicking on the "Add" icon a formula will appear. Now select the customertype, the customer's language and the way the customer is contacted. Enter the information's of the costumer and click on create.

> **Customer > Create: Customer data**

> **Customer**

Customer type <input type="text" value="Repaircenter"/>	Customer's language <input type="text" value="English"/>
Is editable in wizard <input checked="" type="checkbox"/> *	
Customer contact <input type="radio"/> SMS <input type="radio"/> Email	
Company name <input type="text"/>	Department <input type="text"/>
Salutation <input type="radio"/> Mrs <input type="radio"/> Mr	Street <input type="text"/>
First name <input type="text"/>	Additional <input type="text"/>
Last name <input type="text"/>	Zip-Code <input type="text"/>
Email <input type="text"/>	City <input type="text"/>
Phone <input type="text"/>	Country <input type="text" value="SWITZERLAND"/>
Mobile phone <input type="text"/>	

Create

10. Administration

10.1 Company

"Administration - Company" here you find your Company's master data set. You can see the details of your company (such as address, telephone number, time zone, currency, VAT rate, %, etc.) which can be changed any time by clicking on the "Edit" icon.

MY ACCOUNT CUSTOMER ADMIN **ADMINISTRATION** DOCUMENTS STOCK PROCUREMENT

> **Details: Company 'AG'**

AG

Company type	<input type="text"/>
Company	<input type="text"/>
Department	<input type="text"/>
Street	<input type="text"/>
Zip-Code	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Country	<input type="text" value="SWITZERLAND"/>
Timezone (GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna	
Phone	<input type="text" value="+41 58 777 66 00"/>
Fax	<input type="text"/>
Email	<input type="text" value="www.initpro.ch@initpro.ch"/>
Url	<input type="text"/>
VAT Reg.-No.	<input type="text"/>
VAT %	8.00
Currency	CHF
Timeunit-Id	Minutes

Here you will also find an overview of User. The "Actions" column shows 3 icons (edit, detail, delete). By clicking on the “Edit” icon the data’s of the user can be changed. Under “Detail” you will see the details to that user and you will see the Assigned Roles. By clicking on the “Delete” icon the user will be deleted.

Here you also set Current-Settings, Warehouse-Settings and Working hours of your company. By clicking on the “Edit” icon these settings can be changed.

Current settings [Edit]

Is partgroup required **no**

Warehouse-Settings [Edit]

Use warehouse **yes**
 Use Incoming/Outgoing- **no**
 Goods
 Use consignment storage **no**
 Use bonded storage **no**

Working hours [Edit]

Is login-validation required **yes**

Weekday	Start	Finishing time
Monday	05:00	20:00
Tuesday	05:00	20:00
Wednesday	05:00	20:00
Thursday	05:00	20:00
Friday	05:00	20:00

Edit the languages that your company accepts by setting a checkmark next to the language and decide which language is the default language.

Company > Edit: Language

Language	Is in use	Is default
Deutsch	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
English	<input checked="" type="checkbox"/>	<input type="radio"/>
Español	<input type="checkbox"/>	<input type="radio"/>
Français	<input checked="" type="checkbox"/>	<input type="radio"/>
Italiano	<input checked="" type="checkbox"/>	<input type="radio"/>
中國的	<input type="checkbox"/>	<input type="radio"/>
日本の	<input type="checkbox"/>	<input type="radio"/>

Save

10.2 User

To add a user, click the "Add" icon and enter the necessary user information. With each new registration a security check is performed and entering the Captcha string is required. To complete the registration click on "Register".

The screenshot shows a registration form titled "Create new Account: Register". It has two main sections: "Account-Informations" and "Security Check". In the "Account-Informations" section, there are three input fields: "Shop-Email", "Firstname", and "Lastname", each with a red asterisk indicating it is required. In the "Security Check" section, there is a "Captcha" image displaying the text "FSNSM" in a distorted font, followed by a "Captcha-String" input field with a red asterisk. At the bottom right of the form is a black "Register" button.

Existing users can be searched under "**Administration - Users**". The search is performed by typing the first or last name, or by using the alphabetical index. The search is done by clicking on the letter corresponding to the first letter of the surname. By clicking on the @ letter all registered users will be listed.

10.3 PIN

PIN is used to set the creator. It is needed when a Servicecase is captured or passed to a colleague.

The screenshot shows a "Creator" form. At the top left is a dropdown menu with "Creator" selected. On the right are three icons: a pencil for edit, a trash can for delete, and a checkmark for confirmation. The main area contains four text input fields: "Firstname" (filled with "Testperson"), "Lastname" (filled with "Testperson"), "Additional info" (filled with "Entry clerk 868"), and an empty "Comments" field. There is also a small "File" icon next to the "Comments" field.

Already registered PIN's can be searched under "**Administration - PIN**". The search is performed by typing in the first or last name into the search line. To edit or delete a PIN click on the icons in the action column.

Index: PIN

Suche

Index

Aktionen **Vorname** **Nachname** **Zusatz** **Erfasser**

Aktionen	Vorname	Nachname	Zusatz	Erfasser							
	Test	Testing		815							
				821							
				827							
				828							
				829							
				830							
				831							
				832							
				833							
				834							
1	2	3	4	5	6	7	8	9	10	214	215

To create a new PIN you have to click on the "Add" icon the top right. Now enter First- and Lastname and the Entry clerk. You have the opinion to add Additional Informations.

To complete, click on "Create" or click on "Create + New" to create that PIN and stay on this page to create another one.

PIN > Create: PIN

Firstname	<input type="text" value="Example"/> *
Lastname	<input type="text" value="Example"/> *
Additional info	<input type="text" value="ExampleINFO"/>
Entry clerk	<input type="text" value="123"/> *

Create + New **Create**

10.4 DOA check

Create under "**Administration – DOA check**" your individual Dead On Arrival-checks. The DOA-check is a check that is performed when a customer receives a product which does not work. The DOA-check is performed while a new Servicecase is created. If the product passes the DOA-Check the Servicecase will get a "DOA-check passed" status. Click on the "Add" icon to create a textkeys. After that they will be shown in the DOA-Check-Index. Set the ordering of the textkeys by clicking on the "Up" and "Down" icons. To edit or delete a textkey from the DOA-Check click on the icons in the action column.

▶ Index: DOA check

▶ Index



Actions	Textkey	Ordering
	DOA meets deadline according to the date of purchase. Perform testing to DOA?	
	Packaging and complete?	
	Goes back longer than 5 days of sale/delivery at delivery@home?	
	Impeccable condition of the device (no scratches, no mechanical damage)?	
	Impeccable condition in the original packaging (no damage, no additional be schriftungen or sticker)?	
	Is the IMEI number on the appliance and the packaging the same?	

If the first statement of the DOA-check is true set a checkmark. The next DOA-check statement will appear. When all statements of the DOA-check are correct “DOA check passed” will appear.

^ DOA check



- DOA meets deadline according to the date of purchase. Perform testing to DOA?
- Packaging and complete?
- Goes back longer than 5 days of sale/delivery at delivery@home?
- Impeccable condition of the device (no scratches, no mechanical damage)?
- Impeccable condition in the original packaging (no damage, no additional be schriftungen or sticker)?
- Is the IMEI number on the appliance and the packaging the same?

DOA check passed

▶ Edit: Servicecase '0000008'

▾ Workflow [Yes, please provide me with packaging.]

Device delivered to Service Center

▾ Times

▾ Internal comment on behalf of [-]

▾ Loan units

▾ Order number



Order 0000008

Send @ Home yes

Customer Test Muster

Mobile 1111111

Manufacturer

Product group Tablet PC

Workflow Standard*

Warranty Warranty check

Accounting-Type No repair maximum amount

DOA yes

DOA rejected no

Customer tracking Edit

▾ Produktdaten°

▾ Kosten°

10.5 Email Template

Email - Templates allow the user to save time and easy to send emails. "Administration - email templates" may footer and general settings, such as the sender's name, sender email, mail servers, etc., the personal ideas can be adapted. To change the Footer or the Mailserver settings click on the "Edit" icon.

The screenshot shows the 'Email Template: 'Orange Communications AG'' section under the 'ADMINISTRATION' tab. It contains two main sections: 'Footer' and 'Mailserver settings'. The 'Footer' section includes fields for 'Footer' and 'HTML formatted Footer'. The 'Mailserver settings' section includes fields for 'Sender Name', 'Sender Email', 'Mail Server', 'Mail Server Port', 'User Name', and 'SSL Encryption'. Each section has an 'Edit' icon (pencil icon) next to it.

Footer
Footer
HTML formatted Footer

Mailserver settings
Sender Name Repairline.de
Sender Email info@repairline.de
Mail Server
Mail Server Port
User Name
SSL Encryption no

Please enter in your settings if you want use your own mail server, otherwise the default Repairline Mail Server setup is valid.

10.6 Look and Feel

"Administration – Look and Feel" here you can make individual adjustments to the website design. Color scheme, the image of the header and the footer are ready to complete as desired. To change the Look click on the "Edit" icon next to Theme, Header Image, Footer Image, Footer Address, Footer Contact or Contact email on login page. To reset the changes click on the "Reset" icon. All changes require a page reload!

› Look and Feel: 'Orange Communications AG'

Changes require a page reload!

Theme Repairline®

Header Image

Footer Image

Footer Address

Orange Communications AG
Hansastrasse 101
D-8053 Munich

10.7 Know-How

Here under “**Administration – Know-How**” users, manufacturers and companies can share their know-how (general information or product-related information) and thereby optimize the quality of service. To create a general Know-How Message you have to click on the “Add” icon next to general informations. To create a product-related Know-How Message you have to click on the “Add” icon next to product-related informations.

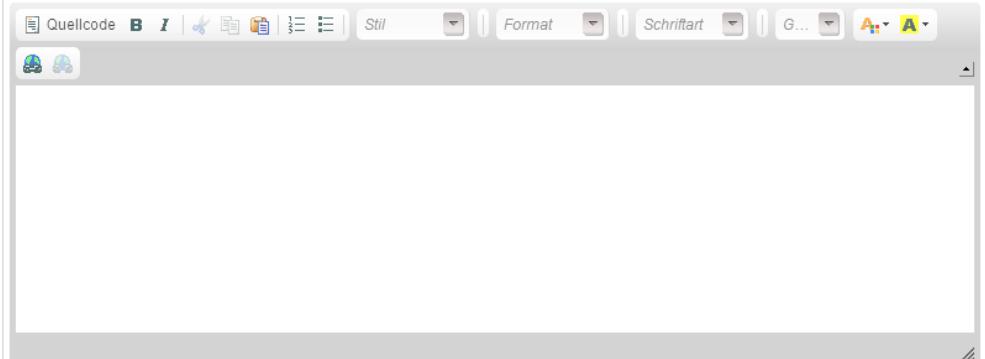
> [Know-How > Enter new Know-How entry](#)

Subject *

Quelle*

Manufacturer - *
Businessunit

Content



Public

Add Attachments

Attachments Keine ausgewählt

Create

10.8 Column selection

Under “**Administration – Column selection**” you can select which columns you want to be displayed.

Each column shows different information’s. Set a checkmark to each column you want to be displayed. To deselect a column, click on the set checkmark and the checkmark will be unselect.

› Edit > Column selection

› Spalten selektieren die angezeigt werden sollen.^o

- Status
- Escalation level
- Booked
- Workflow stopped
- Order
- Predecessor no.
- Warranty
- Customer
- IMEI/Serial no.
- Product
- Manufacturer
- Product group
- Service Type
- Agent

Save

10.9 Accounting

"**Administration - Accounting**" here you have the possibility to create Service-flat-charges and Wage groups of your users. To create a Service-flat-charge or a Wage group, click on the little "Add" icon next to each title. Now you only have to enter your text keys and the corresponding net price. When you type in the net price or the gross price the other one will be set automatically. (To edit the value added tax for your company click on **10.1 "Administration Company"**) To complete, click on "Create" or click on "Create + New" to create that Service-flat-charge/Wagegroup and stay on this page to create another one.

> Index: Forwarder

> Index

Actions	Forwarderkey	Forwarder name	Forwarder
	UPS	UPS	Default

> Index: Accounting AG*

> Service-flat-charge

Actions	Service-flat-charge-Key	Textkey	Price net	Price (gross)
	AK	Austauschkosten*	222.22 CHF	240.00 CHF
	R	Rabatt*	22.22 CHF	24.00 CHF
	RK	Reparaturkosten*	222.22 CHF	240.00 CHF
	Z	Zusatzkosten*	35.00 CHF	37.80 CHF

> Wagegroups

Actions	Textkey	Price net	Price (gross)
	Standard*	0.00 CHF	0.00 CHF

> Accounting > Edit: Service-flat-charge

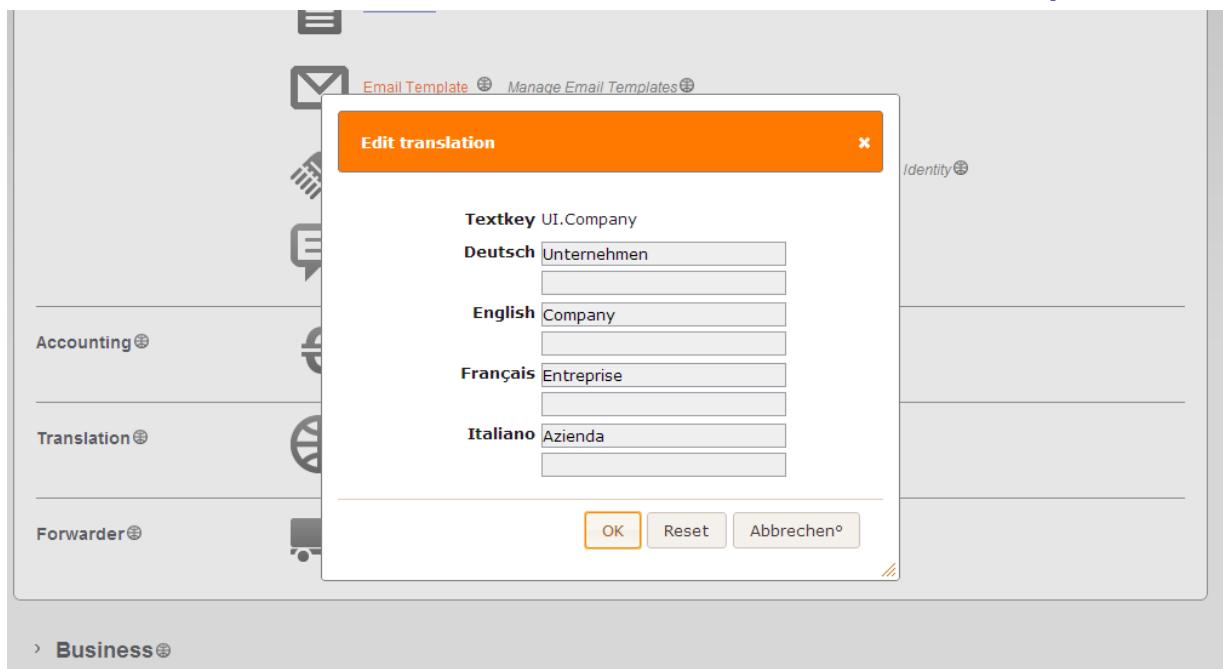
> Service-flat-charge

Service-flat-charge-Key <input type="text" value="Ex"/>	Price net <input type="text" value="10.0000"/> CHF *
Textkey <input type="text" value="Example"/>	Price (gross) <input type="text" value="10.8000"/> CHF
Translated name required	

Create + New **Create**

10.10 Translation Mode

To turn the translation mode on or off, click on "**Administration - Translation Mode**". Is the translation mode is on, after each key text appears this icon: By clicking this icon opens a window for editing the text key. Now you can edit the translation of the text key in the languages that you have chosen for your company.



10.11 Forwarder

To be able to send packets to orders to shipping company (UPS, DHL) will be taught .Click here to update your master data record for carrier / parcel service. To create a new carrier you have to click on the "Add" icon the top right. Now enter the data for your carrier to (Forwarder name and Forwarder type are required) and to complete click on "Create" or click on "Create + New" to add another carrier.

Index: Forwarder			
Index			
Actions	Forwarderkey	Forwarder name	Forwarder
	UPS	UPS	Default

10.12 Service-Code

To create a service code, click on "**Administration – Service-Code**". Service-Codes serve as structured documentation and documentation of failure -symptoms -states and made repairs. You can use either one of the 4 System-Templates and change them the way you want or you can even create your own Service-Code! This allows you a manufacturer-independent service execution.

System-Template can be used. (Such as the IRIS code, a specified, an international standard for structured identification and documentation of fault symptoms, states and performed repairs)

To copy a System-Template, click on the “Copy” icon in the actions column. Now the Service-Code will be shown in the Settings-List. To edit the copied Service-Code, click on the “Edit” icon.

Code-Spezification

Name	IRIS Code *
Description	IRIS Code

Save

Code-section

Actions	Code-section	Code-Relations	Codelevels	Ordering
	Condition	30	Code: Constantly Area: General Type: No action Code: Power problem or not	
	Symptom	707	Area: Common Code: Document holder sec	
	Section	123	Area: Mechanical Code: Software problem	
	Defect	68	Code: Software correction /	
	Repair	46		

Add Code Section

Name <input type="text"/> *
Codelevels <input type="radio"/> 1 <input type="radio"/> 2 <input checked="" type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5

To create your own Service-Code, click on the “Add” icon next to Settings. First you need to specify your code by entering a text code and a description of your code. Now the service code is created. Enter the name of the section and select the number of code levels. Click the “Add” icon next to Add Code Section to add the code section. Any number of code sections and code levels can be created. To order the Code-Sections use the “Up” and “Down” icons in the Ordering column.

10.13 Workflow

Workflow is the actual repair process. This is running the same or similar for repairs. You can also use either one of the System-Templates and change them the way you want or create your own Workflow.

A workflow is divided into several steps. Workflows can contain loops. Each workflow must have a defined start and end state.

To define a workflow, click on the “Add” icon next to settings. Enter the Textkey (name) of the workflow and click on “Create”.

Workflow > Create

Master data

Textkey Example *

Create

After clicking on “Create” you automatically will be forwarded to the next step. Now you have to define the states of your Workflow. The current status corresponds to a state in the Workflow that can be achieved during the repair process. Enter a Textkey for the status and enter a Status-Key. For example, you can use a shortcut of the Textkey for the Status-Key. To add more status, click on the “Add” icon.

Workflow > 'Example' Create > Status

Workflow

Textkey Example
Statuscode Initial

Status

Textkey Status1 *	<input type="button" value="X"/>
Status-Key ST-1	

Textkey Status2 *	<input type="button" value="X"/>
Status-Key ST-2	

Textkey Status3 *	<input type="button" value="X"/>
Status-Key ST-3	

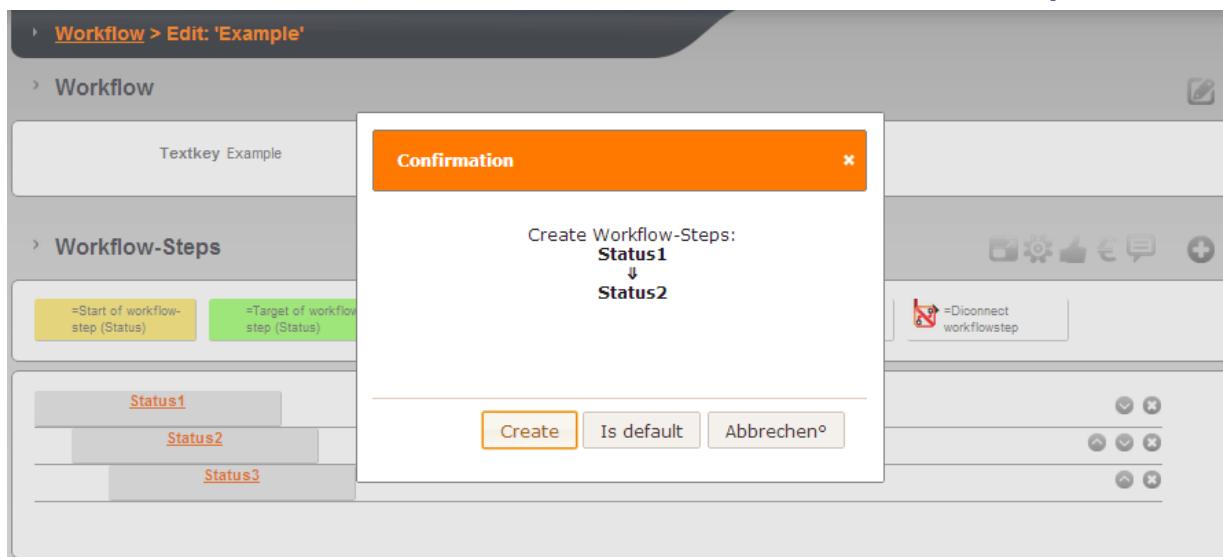
Workflow Save + Next

Now you have to edit your Workflow-Steps. Please note the instructions.



To create a Workflowstep click there, where the line and column of the two statuses are crossing. The status which is the start of the Workflowstep will get a yellow background and the target status will get a green background. Now you have to confirm the Workflowstep click on “Create” to create the Workflowstep, click on “Is default” to set this Workflowstep as the default step or click on “Cancel” (Default Workflowsteps will be shown blue).





To disconnect two statuses, click on the Workflowstep and confirm by clicking on “Delete”.

Start- and Endpoints will be set automatically.



To each state you can add so-called status-roles. These determine what information and input options are available in this status. To confirm the status-roles, click on the “status-roles” icon.



Now set a checkmark where the column of the status and the line of the status-role are crossing. To confirm click on “Save”.

> Status-Roles

	Status 1	Status 2	Status 3
Processing-View			
Incoming	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test procedures	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Repair actions	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Service flats	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outgoing	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Know-How	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Track & Trace (Visitor view)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parcel shipment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loan units	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

Similarly actions can be identified. These actions will be performed when the corresponding status is reached (For example notifications in possible cases of goodwill).

> Actions

	Status1	Status2	Status3
Default			
Cost estimation: Creation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost estimation: Accepted	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cost estimation: Rejected/Scrap	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost estimation: Back to Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Company-Interface: Pass to repair	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Company-Interface: Return to sender	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Close Requisitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Csv export	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Csv export cost estimation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reject DOA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Return all loan units	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Requests			
Case chargeable repair accepted	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Repair with costs declined	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Repair with costs accepted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Warrantyrequest accepted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Warrantyrequest declined	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

Similarly you can set Status-Conditions.

> Status-Conditions

	Status1	Status2	Status3
Position(en) müssen eingetragen sein	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case chargeable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case not chargeable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Received accessory checked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shipped accessory checked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test-Procedures checked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [Administrator]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [PIN]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [Procurement]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [RestrictedTechnician]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [ServiceUser]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [Shop]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [Technician]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [Warehouse]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User cannot be in role [System]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DOA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No DOA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

Similarly you can set Service-flat-charge. These costs will arise when the corresponding statuses are reached.

> Service-flat-charge

		Status1	Status2	Status3
Additional		<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Reparaturkosten*	240.00 CHF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rabatt*	24.00 CHF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Zusatzkosten*	37.80 CHF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Austauschkosten*	240.00 CHF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exclusive		<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Reparaturkosten*	240.00 CHF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rabatt*	24.00 CHF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Zusatzkosten*	37.80 CHF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Austauschkosten*	240.00 CHF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

Similarly you can set Status reasons.

	Status1	Status2	Status3
Test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

To add another Workflowstep click on the “Add” icon.

By clicking on each status settings like Status-Roles, Actions, Status-Conditions, Previous status, Document Template, Status-Reasons, Service-flat-charge, Customer-Email, Sms to Customer and External email can be edit.

10.14 Settings

Under "Administration - Settings" you can set the business unit and manufacturer. Enter the company and the business unit or the manufacturer. Each combination of business unit and manufacturer will be determined individually.

The screenshot shows the 'Settings: Business' section of the initPRO application. It contains three tables:

- Business Unit:** A table with columns 'Actions', 'Company', and 'Business Unit'. It lists three entries, each with a row of icons (edit, info, delete).
- Manufacturer:** A table with columns 'Actions', 'Company', and 'Manufacturer'. It lists four entries, each with a row of icons (edit, info, delete).
- Manufacturer-Businessunits:** A table with columns 'Actions', 'Statuscode', 'Manufacturer', and 'Business Unit'. It lists six entries, each with a row of icons (info, delete). The 'Statuscode' column shows values 'Valid' (green), 'Valid' (green), 'Invalid' (red), 'Invalid' (red), 'Invalid' (red), and 'Invalid' (red).

10.15 Shop-Matrix

Here you can create a Shop-Matrix. In the Shop-Matrix you can set default Repaircenters and Servicecase Ordernumbers for each user. Select the user and click on the “submit” button. Now the Shop Matrix for that user will appear. In the first column the Manufacturer-Businessunits are listed. In the second column you can select a default Repaircenter by selecting it from the dropdown list. In the next column you can set a Servicecase order mask.

For DOA Servicecases other Repaircenters and Servicecase Ordernumbers can be set.

Shop matrix

Select entry All

	ALCATEL - Accessory	Blackberry - Accessory	Doro - Accessory	EMPORA - Accessory	HTC - Accessory	LG - Accessory
0101	Gm ▾ A-0101-@#####-T (DOA) [redacted]service Gm ▾ A-0101-@#####-T	Gm ▾ A-0101-@#####-T (DOA) [redacted]ce Gm ▾ A-0101-@#####-T	AG, ▾ B-0101-@#####-T (DOA) [redacted] AG, Bach ▾ B-0101-@#####-T	[CustomerNumber-898] CompanyName898, LastName898 FirstName898, Email898 M-0101-@#####-T	Gm ▾ A-0101-@#####-T (DOA) [redacted]service Gm ▾ A-0101-@#####-T	ag, mobi ▾ M-0101-@#####-T (DOA) [redacted] ag, mobi ▾ M-0101-@#####-T

10.16 Shop – Users

Create here for your users a Default customer. For that, click on the edit button.

Shop - Users: 'Initpro GmbH'

Index: Shop - Users

User	Default customer
ab, abc [abc, emanuel.wontorra@initpro.de]	[CustomerNumber-898] CompanyName898, LastName898 FirstName898, Email898
Doe, John [emanuel5, john.doe@initpro.de]	[CustomerNumber-899] CompanyName899, LastName899 FirstName899, Email899

Now every registered user will appear. Select one of the listed default customers of the drop down list.

› Shop - Users > Edit: 'Initpro GmbH'

User	Default customer
ab, abc [abc, emanuel.wontorra@initpro.de]	[CustomerNumber-898] CompanyName898, LastName898 FirstName898, E
b, a [abode, emanuel.wontorra@initpro.de]	Select
cd, ab [abcd, emanuel.wontorra@initpro.de]	Select
cd, ab [abcd6, emanuel.wontorra@initpro.de]	Select
Doe, John [emanuel5, john.doe@initpro.de]	[CustomerNumber-899] CompanyName899, LastName899 FirstName899, E
fsdfs, adsads [dddddd, ac@initpro.de]	Select
Halbritter, Ralf [ralf, ralft2]	Select
sdagfsdgsf, sdgfsdgsd [bbbbbb, ac@initpro.de]	Select
sfdasf, adsadssad [cccccc, eadasda@asdad.com]	Select
Wagner3, Markus 21 [mw, markus.wagner@initpro.de]	, Wagner3 Markus 21, markus.wagner@initpro.de
Wontorra6, Emanuel [emanuel6, emanuel.wontorra@initpro.de]	Select

Save

10.17 Service Type

The service type determines which repair services are offered to the customers. Click on “Administration – Service Type”. And again there are a lot of System-Templates that you can use. If the needed Service Type is not listed in the System-Templates you can create your own.

To create your own Service Type, click on the “Add” icon. To complete click on "Create" or click on "Create + New" to add another Service Type.

› Service Type > Create

Servicetype-Key	EX
Textkey	Example *

10.18 Status-Reason

To create state-justifications, click on the "Add" icon next to "Index". Now enter a text key (required), Description and Status Key.

› Status-Reasons > Edit: 'Test'

Textkey	Example *
Description	Example
Status-Key	Repaired

Save

10.19 Reason for Swap

If the repair is not possible for a device it is advantageous to specify the reasons for swaps. To create possible reasons, enter Swapreason-key, and a Textkey. It is possible to use the system templates. To create your own Swapreason click on the “Add” icon. Enter a Swapreason-Key and a Textkey. To confirm, click on “Create” or click on “Create + New” to create the Swapreason and add another one.

› Index: Reasons for Swap

^ System-Templates [9]

Actions	Swapreason-Key	Textkey
	G	Commercial decision
	F	Repair too expensive
	C	Repeating failure
	R	Requested by factory / Service organisation
	A	Spare part back order
	B	Spare part not coded
	P	Spare part not longer available
	E	Standard exchange
	D	Technically not repairable

› Settings

Actions	Company	Swapreason-Key	Textkey
	System template	P	Spare part not longer available

› Reasons for Swap > Create

Swapreason-Key	Ex
Textkey	Example *

Create + New **Create**

10.20 Test Procedures

Actions	Subject	Content	Attachments
	TestProcedureTest1		
	TestProcedureTest2	Check the parts	

Under “**Administration - Test Procedures**” Test Procedures can be described. To edit, delete or see the Informations of a Test Procedure click on the icons in the Actions column.

To add a Test Procedure click on the “Add” icon. Enter the Subject and type in the Test Procedure. You can add attachments (for example pictures, videos etc.).

Test Procedures > Create

Subject *

Content

Public

Add Attachments

Attachments Keine ausgewählt

Create

10.21 Texttemplate

Text templates serve to describe Accessory and Costestimation templates in several languages.

To create a Texttemplate, click on the “Add” icon under “**Administration – Texttemplate**”. Now select the type of the Texttemplate (Accessory or Costestimation template) and enter a description. To complete, click on “Create” or click on “Create + New” to create that Texttemplate and stay on this page to create another one. After clicking on “Create”, enter the meaning in different languages and enter descriptions. To complete click on “Save”.

To edit or delete a Texttemplate, click on the icons in the action column.

› **Texttemplate > Edit: 'Example'**

› **Texttemplate**

Type	<input type="text" value="Accessory"/>	
Deutsch [Beispiel]		
Beispiel		
English [Example]		
Example		
Français [Exemple]		
Exemple		
Italiano [Esempio]		
Esempio		

› **Index: Texttemplate**

› **Index**

Actions	Type	Template
	Accessory	Battery
	Accessory	Charger
	Accessory	data cable
	Accessory	memory card
	Accessory	Headset
	Accessory	SIM Reader
	Accessory	casing
	Accessory	pen
	Accessory	original packaged and complete
	Accessory	warranty paper

› **Texttemplate > Edit: 'AO | Garantie abgelaufen"**

› **Texttemplate**

Type Costestimation templates ▾ *

Save

^  **Deutsch [AO | Garantie abgelaufen]**



Leider hat uns das vom Hersteller autorisierte Service-Center mitgeteilt, dass eine Reparatur in Garantie nicht möglich ist, da die Garantiezeit abgelaufen ist. Somit sind sämtliche Reparaturen kostenpflichtig.

^  **English [-]**



The Service Center authorised by the manufacturer has notified us that a repair cannot be carried out under warranty as the warranty has expired. This means that all repairs are chargeable.

^  **Français [-]**



Le Service Center agréé par le fabricant nous a malheureusement informés qu'il n'est pas possible de procéder à une réparation sous garantie car la garantie est arrivée à échéance. De fait, toutes les réparations seront facturées.

^  **Italiano [-]**



Il Service Center autorizzato dal produttore ci ha comunicato che purtroppo non è possibile effettuare una riparazione in garanzia, poiché la garanzia risulta scaduta. Per questo motivo, tutte le eventuali riparazioni saranno a pagamento.

10.22 Product

To add your products, click on the "Add" icon in "**Administration - Product**". Enter the Articlenumber and Productname and select the Manufacturer and the Businessunit of the product. For each product you can add additional information (such as: Productdescription, Brand, Productioncode number, Dealer-Articlenumber, etc.). To use the Serial number validation, please enter Standard Warranty in Days. It is also possible to add parts to this product. Select the parts out of the parts list or click on the "Add" icon to create a new part.

Products > Create

Products

Articlenumber	123456
Productname	Example
Productdescription	Example
Brand	Example
Productioncode	123456
Dealer-Articlenumber	123456
EAN-Code	123456
Manufacturer-	Standard-Standard [®]
Businessunits	
Weight	1
Is DOA possible	<input checked="" type="checkbox"/>
DOA-Time	10

Serial number validation settings

Template	Example
Standard Warranty in Days	365
Standard Warranty in Days (extended)	366

Parts list

Part-Id	Partnumber	Partname	Partgroups	Actions
				Create + New Create

10.21 Import / Export

In order to find already existing products, enter your product into search line. It doesn't matter whether you enter the Brand, Productname, Articlenumber, EAN-Code, Dealer-Articlenumber or Productdescription.

10.23 Partgroups

Partgroups will help you to organize components and are created in "Administration - Partgroups". To create a Partgroup, enter the Partgroup-key and a Textkey. To confirm, click on "Create" or click on "Create + New" to create the Partgroup and add another one.

Partgroups > Create

Partgroup-key	EX
Textkey	Example

[Create + New](#)
[Create](#)

10.24 Parts

Create in "Administration - Parts" a data set for your parts. Enter the dates of your parts. partnumber, selling price net and basestock are mandatory fields. The parts have to be assigned to manufacturer-business units. To confirm, click on "Create" or click on "Create + New" to create the Part and add another one.

Parts > Create

Parts

Partnumber	123
Partname	Example
Partdescription	Example
EAN-Code	132
Identification	Example
Partgroups	Select item
Selling price net	1.00 CHF
Basestock	0

Manufacturer-Businessunits

<input checked="" type="checkbox"/> Standard-Standard

[Create + New](#)
[Create](#)

Please also note 10.21 Import / Export

In order to find already existing components, type in the search line, type your product. It doesn't matter whether you enter part number, part name, or UPC code.

10.25 Import/Export

To add so many products / parts is time-consuming and labor. Under "Administration - Import / Export" it is possible to transfer your products / parts quickly and easily from an Excel file. Download the template Excel files and enter your product / part data. Select the appropriate manufacturer-business unit and specify the file name.

	A	B	C	D	E	F	G	H	I
1	PartNumber	PartName	EanCode	PartGroupId	PartDescription	Identification	PriceNetSelling	BaseStock	
2	part123	ExamplePart	9780971234581		Nice Part	beta123	45,12	10	
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									

To download the Excel-file template click on the “Excel” icon to download the products / parts Excel file click on the “Download” icon.

Import/Export > Upload products [Excel]

Excel

Manufacturer: Standard-Standard*

Businessunits

Filename: Datei auswählen Keine ausgewählt *

Submit

Already created products / parts can be downloaded as an Excel file, for example to edit changes.

10.26 Number Ranges

Under "Administration - Number Ranges" you have the possibility to create number ranges for Servicecase-Numbers, customernumbers, suppliernumber, delivery notes, costestimation, invoice, partorder, ticketnumber and equipment rental. Select the date of the numbers-reset and the mask.

Index: Number Ranges

Servicecase-Number

NumberReset Never
Mask @@@@
Numberflag @
Last generated number -

Manufacturer-Businessunits

Actions	Is in use	Manufacturer-Businessunits
	yes	Standard-Standard*

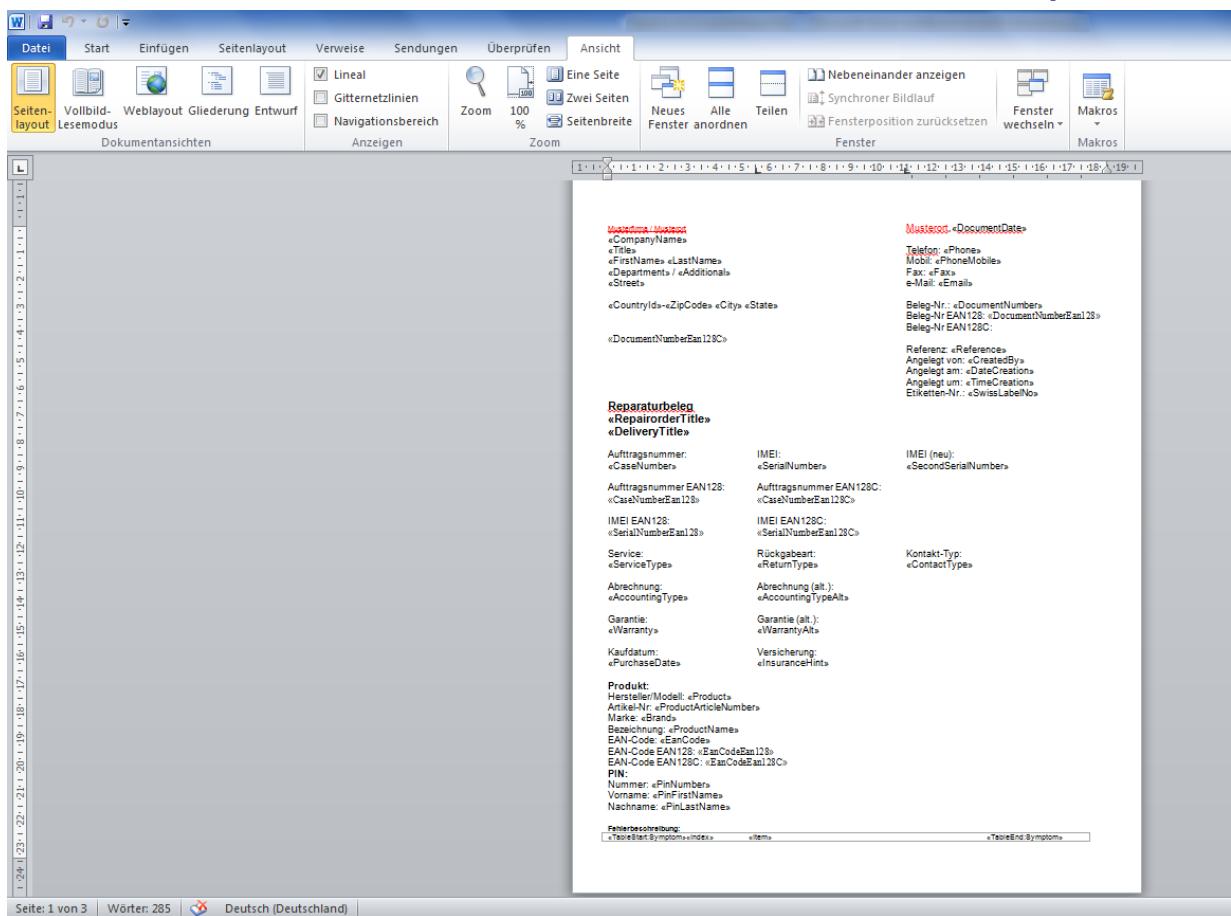
Manufacturer-Businessunits : 'Standard - Standard'

NumberReset Never
Mask RL{YY}{MM}{DD}@@@
Numberflag @
Last generated number

Save

10.27 Document Template

Repairline offers under "Administration - Document Template" a set of document templates (such as a template for a repair slip).



To use your own created templates, click on the "Add" icon and upload your template.

Document Template > Create

Textkey	<input type="text" value="Example"/>
Documenttype	<input type="button" value="Select item"/>
Translationinstruction	<input type="button" value="Companylanguage"/>
Printingqueueinstruction	<input type="button" value="Can be in printingqueue"/>
Printinstruction	<input type="button" value="Both: Print, Print & Book"/>
Addressrelation	<input type="button" value="Select item"/>
Filedescription	<input type="text" value="Example"/>
Upload	<input type="button" value="Datei auswählen"/> Keine ausgewählt
<input type="button" value="Create"/>	

11. Documents

11.1 Documents to print

Under “**Documents - Documents to print**”, all the documents that need to be printed and sent out, will appear. In the "Actions" column, you can print, delete or show the documents detailed by clicking the symbols.

11.2 Document Archive

Under "Documents - Document Archive" you can search every document by using the filters.

The screenshot shows a software interface titled "Index: Document Archive". At the top left is a "Filter" button. On the right side is a "DC" logo. The main area contains several input fields and dropdown menus for filtering documents:

- From [created]
- To [created]
- Reference
- Author
- Documenttype
- Document Template

11 Stock

11.1 Incoming Goods

Repairline features a comfortable warehouse management. Under “**Stock**” you can manage your whole warehouse management.

Incoming goods are entered in “**Stock – Incoming Goods**”. At first enter the Supplier ID (If you have not create them please do that first at “**Procurement – Supplier**”). Every part in the stock must obtain an assigned stock ground (Please enter your stock grounds at “**Stock – Stock Ground**”). Define therefore, on which stock ground the parts are to be stored. Enter the delivery date. You can also enter the delivery number and reference.

Now enter the name of the part and the amount of delivery. By clicking the "delete" icon in the "Actions" column, you can delete unwanted lines. Beyond these three components is required for each additional component a new line. To add a line, click on the "Add" icon. To complete, click “Create“, or click on “Create + New” to enter another income.

› Incoming Goods: Manual Entry

› Supplier

Supplier-Id	[00001] Example *	Street
Suppliernumber	00001	Zip-Code
Companyname	Example	City
Firstname		State
Lastname		Country
Email		

› Delivery Note

Stock Ground	Lager-Nummer Lagerort-Num *
Deliverydate	10/01/2012 *
Deliverynote number	123
Deliverynote date	01/01/2012
Reference	

› Parts

Actions	Parts	Quantity
	123 - Example [132]	

[Create + Next](#) [Create](#)

12.2 Fast Entry

Here you have the opinion to entry your incoming goods very easy and fast. Under “**Stock – Fast Entry**” you will find all the Open Part Orders (see on 12.4) that have been created. (To create a part order, click on “**My Account - Personal Requisition Notes**”) or created them while entering a Servicecase)

› Incoming Goods: Fast Entry => Partoders

› Open Part Orders

Actions	Orderdate	Ordernumber	Reference	Orderstatus	Orderpositions	Supplier
	26/02/2011	OrderNumber4	Reference4	Delivered partly	1	

Click on the “Info” icon in the “Actions” column to look on informations like Supplier, Partoders and Orderpositions.

Click on the “Select” icon to entry the incoming goods. Now the Stock Ground Informations will appear. Select the Stock Ground and enter the Deliverydate. You can also enter Deliverynote number and date and a reference.

After that check the Quantity if the Order-Quantity doesn't match with the Delivery-Quantity please enter the Delivery-Quantity. If an exit check has been done set a check mark to exit check.

Actions	Orderdate	Ordernumber	Reference	Orderstatus	Orderpositions	Supplier
	26/02/2011	OrderNumber4	Reference4	Delivered partly	1	

Stock Ground						
Stock Ground	Lager15 Wareneingang War	*				
Deliverydate	21/12/2012	*				
Deliverynote number						
Deliverynote date						
Reference	OrderNumber4					

Orderpositions *						
Parts	Price net	Unit	Quantity	Quantity delivered	Ausgangsprüfung*	
PartDescription 4	13.00	Unit	13	13	<input type="checkbox"/>	

12.3 Allocate Incoming Goods

Here you control the transfer of the incoming goods into the Stock Grounds. To allocate your goods select your Stock Ground and the Bookingdate. Now all Parts of this Stock Ground will appear. Select the desired Part by clicking on the “Select” icon. The other Stock Ground will appear now. Enter the Quantity in the line of the desired Stock Ground. To complete click on “Save”.

> Incoming Goods: Allocate Incoming Goods
> Stock Ground


Stock Ground *
 Bookingdate *

> Parts

Selection	Parts	Total
⊕	30
⊕	MwTest97 - ExamplePart [9780971234581]	2
⊕	PartNo1 - PartNo1 [ean17]	1
⊕	PartNumber 1000 - PartName 1000 [EanCode 1000]	14
⊕	partTest1 - ExamplePart [9780971234581]	10
⊕	partTest2 - ExamplePart [9780971234581]	3

> Stock Ground

Stock Ground	Total	Reservation	Available	Quantity
Lager15 Lagerort1 Lagerplatz Motorhead	30	0	30	<input type="text"/>
Stock-Test Test-Stock Test	0	0	0	<input type="text"/>
Sum				

Save

12.4 Open Part Orders

Under "Stock - Open Part Orders" you find all of your part orders that have been created.

> Incoming Goods: Open Part Orders

Actions	Orderdate	Ordernumber	Reference	Orderstatus	Orderpositions	Supplier
	27/02/2011 01:00	OrderNumber5	Reference5	Ordered	1	mvc, Gumeplz. 27, 93049, Regensburg
	28/02/2011 01:00	OrderNumber6	Reference6	Ordered	1	mvc, Gumeplz. 27, 93049, Regensburg
	09/03/2011 01:00	OrderNumber15	Reference15	Ordered	1	mvc, Gumeplz. 27, 93049, Regensburg

Click on the "Info" icon in the "Actions" column to look on Informations like Supplier, Partoders and Orderpositions. You can print or cancel the order by clicking on the icons on the top right.

> Incoming Goods: Fast Entry
> Open Part Orders

Actions	Orderdate	Ordernumber	Reference	Orderstatus	Orderpositions	Supplier
	28/02/2011	OrderNumber6	Reference6	Ordered	1	mvc, Gumeplz. 27, 93049, Regensburg
	09/03/2011	OrderNumber15	Reference15	Ordered	1	mvc, Gumeplz. 27, 93049, Regensburg

> Stock Ground

Stock Ground *

Deliverydate *

Deliverynote number

Deliverynote date

Reference

Orderpositions *

Parts	Price net	Unit	Quantity	Quantity delivered	Ausgangsprüfung*
PartDescription 6	15.00	Unit	15	<input type="text" value="15"/>	<input type="checkbox"/>

Save

By clicking on the “Edit” icon the Stock Ground Informations will appear. Select the Stock Ground and enter the Deliverydate. You can also enter Deliverynote number and date and a reference.

After that please check the Quantity if the Order-Quantity doesn’t match with the Delivery-Quantity please enter the Delivery-Quantity. If an exit check has been done set a check mark to exit check. To complete click on “Save”. Now the Order is finish it will be delete automatically from your Open Parts Order List.

12.5 Delivery Note

Here you'll find the list of all of your delivery notes. Use the many filters, such as Partgroups, Deliverynote number, manufacturer-business units, Bookingdate from, etc., so that your search specifically to the desired result.

› Incoming Goods: Delivery Note

› Filter

Deliverynote number	<input type="text"/>
Parts	<input type="text"/>
Partgroups	MyBaugruppe*
Manufacturer	<input type="text"/>
Businessunits	<input type="text"/>
Bookingdate from	<input type="text"/> 10/12/2012
Bookingdate to	<input type="text"/> 30/12/2012
Supplier	<input type="text"/>
Reference	<input type="text"/>

› Delivery Note

Deliverydate	Bookingdate	Supplier	Deliverynote number	Reference
21/12/2012	21/12/2012 01:08	[S01] Lager15 Wareneingang		OrderNumber2
• Lager15 Wareneingang Wareneingang - PartNumber 2 - PartName 2 [EanCode 2] = 11				

12.6 Manual Entry

Make here the transfer of Parts between your Stock Ground. Select the Stock Grounds, which will take place between the transfers and enter the posting date.

› Create: Stock => Manual Entry

› Stock Ground

Stock Ground	<input type="text"/> Select item *
- ↓	
Stock Ground	<input type="text"/> Select item *
Bookingdate	<input type="text"/> 01/01/2012 *

› Stock Level

No stock level available

Save

12.7 Stock Requisition

In "Stock - Stock Requisition" parts can manually be taken (without a regard to a Servicecase). Specify the user, the part and the booking date. Now appear all storage bins (with stock) having the specified component. Now enter each amount that you take to the line of the Stock Ground. To complete, click on "Create" or click on "Create + Next" to perform more Stock Requisition.

› Create: Stock => Stock Requisition

› Fields

User	<input type="text" value="Eva John (evajohn@...), John Doe"/>	*
Parts	<input type="text" value="MwTest97 - ExamplePart [978097]"/>	*
Bookingdate	<input type="text" value="01/01/2012"/>	*
Is revision-booking	<input checked="" type="radio"/> <input type="radio"/>	

› Stock Ground

Stock Ground	Stock Level	Reservation	Available	Quantity
Lager15 Lagerort1 Lagerplatz Zappa	40	13	27	<input type="text"/>
Lager15 Lagerort1 Test1	100	0	100	<input type="text"/>
Lager15 Wareneingang Wareneingang	2	2	0	<input type="text"/>
Sum				0

12.8 Stock Posting

Under "**Stock - Stock Posting**" you can manually add Parts to your Stock Grounds. Specify the User, the Part and the Booking Date. Now all Stock Grounds that can store the specified Part will appear. Now enter each amount that you add to the Stock Grounds. To complete, click on "Create" or click on "Create + Next" to add more Parts to your Stock Grounds.

› Create: Stock => Stock Posting

› Fields

User	<input type="text" value="Example"/>	*
Parts	<input type="text" value="partTest1 - ExamplePart [9780971]"/>	*
Bookingdate	<input type="text" value="28/12/2012"/>	*
Is revision-booking	<input checked="" type="radio"/> <input type="radio"/>	

› Stock Ground

Stock Ground	Stock Level	Reservation	Available	Quantity
Lager15 Lagerort1 Lagerplatz Zappa	0	0	0	<input type="text"/>
Lager15 Lagerort1 Test1	0	0	0	<input type="text"/>
Sum				0

12.9 Stock Level

Under "**Stock – Stock Level**" you can obtain an overview of the Quantity in your Stocks.

To determine your Stock Levels, use the filters. You can use the filters: Parts, Partgroup, Manufacturer-BusinessUnits, Stock, Stock Location and Stock Ground singly or all at once. Now the Parts and the Parts Informations (like Part-Id, Basestock, EAN-Code etc.) will appear. By clicking on “Stock Ground” ever Stock that has that Part will appear. This will show you the exact storage location, the Stock Level, how many Parts are reserved and how many Parts are available. To request a requisition for one Part, click on the "Request" icon in the "Actions" column. Now enter quantity and required delivery date and click on "Create". To create a common request you have to click on the “**Request**” icon on the top right.

▶ **Stock: Stock Level**

› **Filter**

Parts	example
Partgroups	Select item
Manufacturer- Businessunits	Select item
Stock	Select item
Stock Location	Select item
Stock Ground	Select item

› **Stock Allocation**

Actions	Part-Id	Partnumber	Partname	EAN-Code	Partdescription	Stock Level	Reservation	Basestock	Available																				
	3051	MwTest97	ExamplePart	9780971234581	Nice Part	142	15	10	117																				
<div style="border: 1px solid orange; padding: 2px;"> Stock Ground</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2">Stock</th><th>Stock Level</th><th>Reservation</th><th>Available</th> </tr> </thead> <tbody> <tr> <td>Lager15</td><td>Lagerort1</td><td>Lagerplatz Notmeid</td><td>40</td><td>13</td></tr> <tr> <td>Lager15</td><td>Lagerort1</td><td>Test</td><td>100</td><td>0</td></tr> <tr> <td>Lager15</td><td>Warenausgang</td><td>Warenausgang</td><td>2</td><td>2</td></tr> </tbody> </table>										Stock		Stock Level	Reservation	Available	Lager15	Lagerort1	Lagerplatz Notmeid	40	13	Lager15	Lagerort1	Test	100	0	Lager15	Warenausgang	Warenausgang	2	2
Stock		Stock Level	Reservation	Available																									
Lager15	Lagerort1	Lagerplatz Notmeid	40	13																									
Lager15	Lagerort1	Test	100	0																									
Lager15	Warenausgang	Warenausgang	2	2																									
	3038	partTest1	ExamplePart	9780971234581	Nice Part	25	0	10	15																				
<div style="border: 1px solid orange; padding: 2px;"> Stock Ground</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2"></th><th>Stock Level</th><th>Reservation</th><th>Available</th> </tr> </thead> <tbody> <tr> <td>Lager15</td><td>Warenausgang</td><td>Warenausgang</td><td>3</td><td>0</td></tr> </tbody> </table>												Stock Level	Reservation	Available	Lager15	Warenausgang	Warenausgang	3	0										
		Stock Level	Reservation	Available																									
Lager15	Warenausgang	Warenausgang	3	0																									
	3039	partTest2	ExamplePart	9780971234581	Nice Part	3	0	10	-7																				
<div style="border: 1px solid orange; padding: 2px;"> Stock Ground</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2"></th><th>Stock Level</th><th>Reservation</th><th>Available</th> </tr> </thead> <tbody> <tr> <td>Lager15</td><td>Warenausgang</td><td>Warenausgang</td><td>0</td><td>0</td></tr> </tbody> </table>												Stock Level	Reservation	Available	Lager15	Warenausgang	Warenausgang	0	0										
		Stock Level	Reservation	Available																									
Lager15	Warenausgang	Warenausgang	0	0																									

› **Personal Requisition Notes > Create: Requisition Notes**

› **Requisition Notes**

User	John Doe (john.doe@innovative.it)
Parts	MwTest97 - ExamplePart [978097]
Available 0	
Quantity	<input type="text"/> *
Requested Deliverydate	<input type="text"/>

Create

12.10 Stock Allocation

Under “**Stock – Stock Level**” you can obtain an overview of your Stock Ground and the specific Parts of inventory.

Use the many filters, such as Parts, Partgroups, Manufacturer-Businessunits, Stock, Stock Location and Stock Ground so that your search shows you quickly the desired result.

To create a Request you have to click on the “**Request**” icon on the top right.

	10	0	10
MwPart2 - Joghurt [9780971234581]	10	0	10

12.11 Stock Ground

Here you can specify the settings for the name of your Stock and their order.

To rename a Stock (or Stock Location, Stock Ground) click on the "Edit" icon in the "Actions" column and enter the new name of the Stock. To delete a Stock (or Stock Location, Stock Ground), click on the "Delete" icon in the "Actions" column. To learn the details of a Stock (or Stock Location, Stock Ground), click on the "Details" icon in the "Actions" column.

By clicking on the "Up" and "Down" icons in the "Ordering" column, you can sort your Stocks / Stock Locations / Stock Grounds as you like.

Index: Warehouse-Settings

Stock

Actions	Stock	Ordering
	Lager Kleinteile1	
	Lager15	
	Stock-Test	

Stock Location

Actions	Stock Location	Ordering
Lager Kleinteile1		
	Lagerort_Test	
Lager15		
	Warenausgang	
	Lagerort1	
	Lagerort2_2	
	Wareneingang	
Stock-Test		
	Test-Stock	

Stock Ground

Actions	Stock Ground	Stock Ground Type	Ordering
Lager15 Warenausgang			
	Warenausgang	Outcoming goods	

To create a Stock, click on the "Add" icon and enter the name of the Stock (you have the possibility to type in a description of that Stock). To complete, click on "Create" or click on "Create + New" to add another Stock.

Warehouse-Settings > Create: Stock

Stock-No	<input type="text" value="Example"/> *
Description	<input type="text" value="Example"/>

Create + New **Create**

To create a Stock Location, click on the "Add" icon and enter the name of the Stock Location (you have the possibility to type in a description of that Stock Location) and assign a Stock to that Stock Location. To complete, click on "Create" or click on "Create + New" to add another Stock Location.

Warehouse-Settings > Create: Stock Location

Stocklocation-No	Example Location	*
Description	Example Description	
Stock	Stock-Test	*

[Create + New](#) [Create](#)

To create a Stock Ground, click on the "Add" icon and enter the name of the Stock Ground (you have the possibility to type in a description of that Stock Ground) and assign a Stock and a Stock Location to that Stock Ground. To complete, click on "Create" or click on "Create + New" to add another Stock Ground.

Warehouse-Settings > Create: Stock Ground

Stockground-No	Example	*
Description	Example	
Stock Location	Stock-Test Test-Stock	*
Stock Ground Type	Stock Ground	*

[Create + New](#) [Create](#)

Each Stock Ground must be assigned to a Stock Location and each Stock Location must be assigned to a Stock!

13 Procurement

13.1 Intending Orders

Under "**Intending Orders**" you will see all the Part Orders that has to be finished. To delete an Intending Order, click on the "Delete" icon in the "Actions" column. Click on the "Edit" icon in the "Actions" column to learn the details of the planned order.

> Index: Intending Orders

> Intending Orders



Actions	created	Ordernumber	Reference	Orderstatus	Orderpositions	Supplier
	22/02/2011 10:33	OrderNumber10	Reference10	To Order	1	
	22/02/2011 10:33	OrderNumber10	Reference10	To Order	1	
	22/02/2011 10:33	OrderNumber11	Reference11	To Order	1	
	22/02/2011 10:33	OrderNumber12	Reference12	To Order	1	
	22/02/2011 10:33	OrderNumber13	Reference13	To Order	1	
	22/02/2011 10:33	OrderNumber14	Reference14	To Order	1	
	15/03/2011 16:34	[inpr5-00001]		To Order	0	
	05/04/2011 17:16	tmp		To Order	1	
	05/04/2011 17:55	tmp		To Order	1	
	05/04/2011 18:29	[inpr5-00002]		To Order	1	
	22/02/2011 10:33	OrderNumber8	Reference8 pp	To Order	1	
	08/06/2011 14:17	[inpr5-00004]		To Order	1	
	20/06/2011 14:43	[inpr5-00010]	test2008	To Order	1	
	20/06/2011 14:48	[inpr5-00011]	test2008_01	To Order	1	
	21/06/2011 09:01	[inpr5-00012]		To Order	1	
	21/12/2012 02:21	[inpr5-00013]		To Order	1	

Create a Part Order by check the Supplier/Partorders/Orderpositons. To edit the Supplier, click on the “Edit” icon. Enter your Partorders and Orderpositons. (to add another Orderposition click on the “Add” icon. To complete click on “Generate Partorder” or click on “Save” to save the changes.

› Intending Orders > Edit: 'OrderNumber7'

› Supplier

Suppliernumber S01	Department
Reference	Street <input type="text"/>
Companyname <input type="text"/>	Additional
Title <input type="text"/>	Zip-Code <input type="text"/>
Firstname <input type="text"/>	City <input type="text"/>
Lastname <input type="text"/>	State Bayern
Email <input type="text"/>	Country GERMANY
Phone 12313213	
Phone mobile <input type="text"/>	
Fax <input type="text"/>	

› Partorders

Orderdate <input type="text"/> 3/1/2011 *	Terms of delivery <input type="text"/> TermsOfDelivery
Deliverydate <input type="text"/> 3/4/2011	Terms of payment <input type="text"/> TermsOfPayment
Reference <input type="text"/> Reference7	Orderinstructions <input type="text"/>
Orderstatus To Order	

› Orderpositions

Actions	Parts	Price net	Unit	Quantity	Deliverydate
<input type="checkbox"/>	MwTest97 - ExamplePart	<input type="text"/>	<input type="text"/>	<input type="text"/> 10	<input type="text"/>

13.2 Order Proposals

Under „Procurement – Order Proposals“, you can create Purchase Orders dependent on Requisition Notes.

The Order Proposals are grouped into Preferred Supplier, Low Priced Supplier and Missing Supplier. To generate a Partorder, set a checkmark in the Actions column to each Part for which a Partorder is to be made and enter the requesting amount. To complete, click on “Generate Partorder”.

Index: Order Proposals

[Preferred supplier](#) [Low priced supplier](#) [Missing supplier](#)

Actions	Parts	Requested Deliverydate	Supplier	Available	Ordered	Booked	Reserved	Requesting
<input type="checkbox"/>	MwTest97 - ExamplePart [9780971234581]		[S01] Wagner Enterprise, Wagner	27	30	0	11	0
<input type="checkbox"/>	MwTest97 - ExamplePart [9780971234581]	21/12/2012 01:00	[S01] Wagner Enterprise, Wagner	27	20	0	0	0
<input type="checkbox"/>	PartNo1 - PartNo1 [ean17]		[S01] Wagner Enterprise, Wagner	1	27	0	0	0
<input type="checkbox"/>	PartNumber 1 - PartName 1 [EanCode_1]		[S01] Wagner Enterprise, Wagner	0	30	0	0	0
<input checked="" type="checkbox"/>	PartNumber 1 - PartName 1 [EanCode_1]	24/02/2011 15:03	[S01] Wagner Enterprise, Wagner	0	10	0	0	10

[Generate partorder](#)

To see all the Parts with missing suppliers click on “[Missing Supplier](#)”. Type in the name of the supplier and set a checkmark to that Parts to which want to add a supplier. To complete click on “[Save](#)”

Index: Order Proposals

[Preferred supplier](#) [Low priced supplier](#) [Missing supplier](#)

Supplier

Supplier [S02] Wagner 2, Wagner, m@init

Actions	Parts	Available	Ordered	Booked	Reserved	Quantity
<input checked="" type="checkbox"/>	MwTest4 - ExamplePart [9780971234581]	0	0	0	0	0
<input checked="" type="checkbox"/>	MwTest3 - ExamplePart [9780971234581]	0	98	0	0	0
<input type="checkbox"/>	MwTest9 - ExamplePart [9780971234581]	0	0	0	0	0
<input type="checkbox"/>	PartNumber 10 - PartName 10 [EanCode_10]	0	99	0	0	0
<input type="checkbox"/>	PartNumber 100 - PartName 100 [EanCode_100]	0	0	0	0	0
<input type="checkbox"/>	PartNumber 1000 - PartName 1000 [EanCode_1000]	5	0	0	0	0
<input type="checkbox"/>	partTest1 - ExamplePart [9780971234581]	10	10	0	0	0
<input type="checkbox"/>	partTest1 - ExamplePart [9780971234581]	10	5	0	0	0
<input type="checkbox"/>	partTest6 - ExamplePart [9780971234581]	0	0	0	0	0

[Save](#)

13.3 Open Requisition Notes

Here you have the opportunity to see all open requisitions.

The Open Requisition Notes are grouped into Servicecaserelated and Common Requisitions. Click on the “[Information](#)“ icon, to get the details of the requisition.

Index: Open Requisition Notes
Servicecaserelated [18]

Actions	User	Parts	Quantity	Servicecase	created	Requested Deliverydate	Booked	Reserved	Available	Ordered	Quantity open
	Doe, John (emanuel5, john.doe@initpro.de)	partTest6 - ExamplePart [9780971234581]	1	case-00062	23/08/2012 10:14		0	0	0	0	1
	Doe, John (emanuel5, john.doe@initpro.de)	PartNo1 - PartNo1 [ean17]	1	case-00068	11/06/2012 09:39		0	0	1	0	1
	Doe, John (emanuel5, john.doe@initpro.de)	PartNo1 - PartNo1 [ean17]	1	case-00080	23/04/2012 11:07		0	0	1	0	1
	Doe, John (emanuel5, john.doe@initpro.de)	PartNo1 - PartNo1 [ean17]	1	case-00077	23/04/2012 10:13		0	0	1	0	1
	Doe, John (emanuel5, john.doe@initpro.de)	PartNo1 - PartNo1 [ean17]	2	ABC123	12/04/2012 14:11		0	0	1	0	2
	Doe, John (emanuel5, john.doe@initpro.de)	PartNo1 - PartNo1 [ean17]	8	ABC123	12/04/2012 13:43		0	0	1	0	8
	Doe, John (emanuel5, john.doe@initpro.de)	PartNo1 - PartNo1 [ean17]	10	ABC123	12/04/2012 13:41		0	0	1	0	10
	Doe, John (emanuel5, john.doe@initpro.de)	PartNo1 - PartNo1 [ean17]	1	ABC123	12/04/2012 13:23		0	0	1	0	1
	Doe, John (emanuel5, john.doe@initpro.de)	MwTest4 - ExamplePart [9780971234581]	3	case-00052	20/06/2011 10:40		0	0	0	0	3
	Doe, John (emanuel5, john.doe@initpro.de)	partTest1 - ExamplePart [9780971234581]	2	case-00062	20/06/2011 10:39		0	0	10	0	2
	Doe, John (emanuel5, john.doe@initpro.de)	PartNo1 - PartNo1 [ean17]	12	case-00052	17/06/2011 08:49		0	0	1	0	12
	Doe, John (emanuel5, john.doe@initpro.de)	partTest1 - ExamplePart [9780971234581]	1	case-00013	15/06/2011 15:51		0	0	10	0	1
	Doe, John (emanuel5, john.doe@initpro.de)	MwTest2 - ExamplePart [9780971234581]	2	case-00038	24/05/2011 16:52		0	0	0	0	2
	Doe, John (emanuel5, john.doe@initpro.de)	partTest5 - ExamplePart [9780971234581]	1	case-00038	24/05/2011 16:51		0	0	0	0	1
	Doe, John (emanuel5, john.doe@initpro.de)	PartNumber 1 - PartName 1 [eanCode 1]	1	case-00022	29/04/2011 16:10		0	0	0	0	1
	Doe, John (emanuel5, john.doe@initpro.de)	PartNumber 100 - PartName 100 [eanCode 100]	2	ABC123	14/04/2011 18:37		0	0	0	0	2
	Doe, John (emanuel5, john.doe@initpro.de)	PartNumber 10 - PartName 10 [eanCode 10]	2	ABC123	15/03/2011 14:09		0	0	0	0	2
	Doe, John (emanuel5, john.doe@initpro.de)	PartNo1 - PartNo1 [ean17]	1	ABC123	04/03/2011 10:19		0	0	1	0	1

Common [11]

Actions	User	Parts	Quantity	Servicecase	created	Requested Deliverydate	Booked	Reserved	Available	Ordered	Quantity open
	Doe, John (emanuel5, john.doe@initpro.de)	partTest1 - ExamplePart [9780971234581]	10	no	28/12/2012 01:07	28/12/2012	0	0	10	0	10
	Doe, John (emanuel5, john.doe@initpro.de)	MwTest97 - ExamplePart [9780971234581]	12	no	21/12/2012 02:25	21/12/2012	0	0	27	10	12
	Doe, John (emanuel5, john.doe@initpro.de)	MwTest97 - ExamplePart [9780971234581]	10	no	21/12/2012 02:23		0	0	0	0	10
	Doe, John (emanuel5, john.doe@initpro.de)	MwTest97 - ExamplePart [9780971234581]	1,000	no	21/12/2012 02:20	21/12/2012	0	0	27	10	1,000
	Wagner3, Markus 21 [mw, markus.wagner@initpro.de]	MwTest97 - ExamplePart [9780971234581]	1	no	08/06/2011 10:11		0	0	27	10	1
	Wagner3, Markus 21 [mw, markus.wagner@initpro.de]	partTest5 - ExamplePart [9780971234581]	1	no	08/06/2011 09:59		0	0	0	0	1
	Doe, John (emanuel5, john.doe@initpro.de)	partTest5 - ExamplePart [9780971234581]	1	no	08/06/2011 09:58		0	0	0	0	1

13.4 Requisition Notes

Under "Procurement - Requisition Notes" you will find all of the Requisition Notes. Again you have the option to create a new requisition. Just click on the "Requesting" icon. To learn more about the requisition, click on the "Information" icon in the "Actions" column.

▶ Index: Requisition Notes

▶ Requisition Notes

 1
2
3

Actions	Requisition-d	User	Parts	Quantity	Requested Deliverydate
	50	Requisition Status 01 [Info - Requisition]	PartNumber 1 - PartName 1 [EanCode 1]	5	
	52	Requisition Status 01 [Info - Requisition]	PartNumber 1 - PartName 1 [EanCode 1]	1	24/02/2011
	54	Requisition Status 01 [Info - Requisition]	PartNo1 - PartNo1 [ean17]	1	
	55	Requisition Status 01 [Info - Requisition]	PartNumber 1000 - PartName 1000 [EanCode 1000]	10	09/03/2011
	56	Requisition Status 01 [Info - Requisition]	PartNumber 1 - PartName 1 [EanCode 1]	1	
	57	Requisition Status 01 [Info - Requisition]	PartNumber 10 - PartName 10 [EanCode 10]	2	
	59	Requisition Status 01 [Info - Requisition]	PartNumber 100 - PartName 100 [EanCode 100]	2	
	65	Requisition Status 01 [Info - Requisition]	PartNumber 1 - PartName 1 [EanCode 1]	1	
	79	Requisition Status 01 [Info - Requisition]	partTest6 - ExamplePart [9780971234581]	1	
	80	Requisition Status 01 [Info - Requisition]	MwTest8 - ExamplePart [9780971234581]	2	

1 2 3

13.5 Part Order Book

Here you will see a list of your Part Orders.

Use the filters under "**Purchasing - Part Order Book**" in order to find the desired Part order. Click on the "Information" icon in the "Actions" column to get the details of the order.

▶ Index: Part Order Book

▶ Filter



Orderdate from	<input type="text" value="01/11/2012"/>
Orderdate to	<input type="text" value="07/01/2013"/>
Ordernumber	<input type="text"/>
Supplier	<input type="text"/>
Orderstatus	<input type="button" value="Select item"/>

▶ Partorders

Actions	Orderdate	Ordernumber	Reference	Orderstatus	Orderpositions	Supplier
	21/12/2012	[inpr5-00013]		To Order	1	Info Elements 01 - Beispiel
	28/12/2012	[inpr5-00014]		To Order	1	Info Elements 01 - Beispiel

13.6 Supplier

Here is the data set of your Suppliers.

Already registered suppliers can be searched under "**Purchasing - Supplier**". The search is performed by entering the company name (search also accepts Lastname, Firstname, Suppliernumber, Email, Street, Zip-Code, City) or by using the alphabetical index. The search

is done by clicking on the letter that corresponds to the first letter of the last name / company name. By clicking on the @ sign, all registered suppliers are listed.

Actions	Suppliernumber	Companyname	Lastname	Firstname	Title	Address
	S01	Example				Street 123, Zip-Code 12345
	S02	Example				Street 123, Zip-Code 12345
	tttttt	Example	tst	tst		Street 123, Zip-Code 12345
	inpr-00003	Example	rew	rew		Street 123, Zip-Code 12345
	inpr5-00007	Example				Street 123, Zip-Code 12345
	inpr5-00008	Example				Street 123, Zip-Code 12345
	inpr5-00009	Example				Street 123, Zip-Code 12345

To add a new Supplier, click on the “add” icon. Now enter the Informations of the supplier and click on Create.

To delete a Supplier, click on the “Delete” icon in the "Actions" column. To learn the details of a Supplier, click on the “Details” icon in the "Actions" column. To edit a Supplier, click on the “Edit” icon in the “Actions” column. By clicking on the “Edit” icon you can edit the Master

record and Invoice of the Supplier and add Contact or Delivery Information (for that click on the “Add” icon).

> **Supplier > Edit: 'inpr3-00001'**

> **Master record**

Reference	<input type="text"/>	Email	<input type="text"/>
Companyname	Example *	Phone mobile	0123456789 *
Title	<input type="text"/>		
Firstname	<input type="text"/>		
Lastname	<input type="text"/>		

Save

> **Contact**

> **Delivery**

> **Invoice**

Companyname Example	Department
Salutation	Street Example 1
Title	Additional
Firstname	Zip-Code 1234
Lastname	City Example
Email	State
Phone	Country GERMANY
Phone mobile 0123456789	
Fax	